

Member History Chart (Printable Chart)

Member History	Hiring into an Eligible PERS Position Report as	Hiring into a Eligible LEOFF Position Report as	Hiring into a Eligible SERS Position Report as	Hiring into a Eligible TRS Position Report as
No Previous Membership				
No Membership History	New Member ¹	LEOFF 2	SERS 3 ²	TRS 3 ³
PERS Previous Membership				
Plan 1 member	PERS 1	LEOFF 2	PERS 1	TRS 3 ³
Plan 2 member	PERS 2 January Transfer Option ⁴	LEOFF 2	SERS 2 January Transfer Option ⁴	TRS 3 ³
Plan 2 Chosen member	PERS 2 – Chosen Member ⁵	LEOFF 2	SERS 2-January Transfer Option ⁴	TRS 3 ³
Plan 2 Converted to SERS member	New Member ¹	LEOFF 2	See SERS membership history	TRS 3 ³
Plan 3 member	PERS 3 ⁶	LEOFF 2	SERS 3 ²	TRS 3 ³
No Plan 2/3 choice made	New Member ¹	LEOFF 2	SERS 2-January Transfer Option ⁴	TRS 3 ³
LEOFF Previous Membership				
Plan 1 member	New Member ¹	LEOFF 1	SERS 3 ²	TRS 3 ³
Plan 2 member	New Member ¹	LEOFF 2	SERS 3 ²	TRS 3 ³
SERS Previous Membership				
Plan 2 member	New Member ¹	LEOFF 2	SERS 2- January Transfer Option ⁴	TRS 3 ³
Plan 3 member	New Member ¹	LEOFF 2	SERS 3 ²	TRS 3 ³
TRS Previous Membership				
Plan 1 Former (withdrawn)	New Member ¹	LEOFF 2	SERS 3 ²	Contact DRS
Plan 1 Member	Employer Type ⁷	LEOFF 2	TRS 1	TRS 1
Plan 2 member	New Member ¹	LEOFF 2	SERS 3 ²	TRS 2- January Transfer Option ⁴
Plan 3 member	New Member ¹	LEOFF 2	SERS 3 ²	TRS 3 ³

¹ **New Member** – has 90 calendar days to make an irrevocable Plan Choice. New employees who first established PERS membership on or after March 1, 2002, (for state agency or higher education employers), or on or after September 1, 2002, (for local government employers) have the option to become a member of PERS Plan 2 or Plan 3. The employee must be reported in PERS Plan 2 until they choose their Plan or are defaulted by the employer into PERS Plan 3, rate option A, investment program WSIB. If reporting for the first time, be sure to include the Begin Date, even if it's the same as the Plan Choice date.

² **SERS 3** – Member has 90 calendar days from hire date to select a Contribution Rate Option and Investment Program.

³ **TRS 3** – Member has 90 calendar days from hire date to select a Contribution Rate Option and Investment Program.

⁴ **January Transfer Option** – an individual has the option to transfer to Plan 3 in January of any year and must select their Contribution Rate Option and Investment Program at that time.

⁵ **PERS Plan 2 Chosen Member** – An individual who chose PERS Plan 2 during their 90 calendar day period does not have the option to transfer in January.

⁶ **PERS 3** – Member has 90 calendar days from hire date to select their Contribution Rate Option and Investment Program.

⁷ **Employer Type** – For state agency, higher education or school district employers report in TRS Plan 1 regardless of the type of position. For local government employers treat as a New Member.¹